



Chart Form Creator

Version 4.0

User Guide

Updated 01/16/2014

*Chart Form Creator was design by Jeremy J. Leshko for Nordan Chiropractic Center. For information regarding this software please visit jeremyleshko.com. Current Version 4.0. Software last updated November 2013. **No real patient names are used in this document.***

©Copyright Jeremy J. Leshko 2011-2014

Contents

Introduction	1
Interface Overview.....	1
Starting the Application	2
Add a New Patient.....	3
Edit an Existing Patient.....	4
Delete a Patient	5
Daily Forms Tab	6
Overview	6
Creating a Print List	7
Printing Daily Forms	9
Changing the Order of Patients in the Print List	12
Day Sheet Tab	13
Overview	13
Creating a Day Sheet	14
Print a Day Sheet	15
Sign in Placement Sheet Tab	17
Overview	17
Creating a Sign in Placement Sheet	18
Printing a Sign in Placement Sheet	19
X-Ray Card Tab	21
Overview	21
Creating a X-Ray Card.....	22
Printing a X-Ray Card	25
Feet Check Tab.....	27
Overview	27
Creating a Feet Check Form.....	28
Printing a Feet Check Form.....	29
Fax Cover Sheet Tab	32
Importing a Patient List [Advance]	33

Introduction

This software is intended to facilitate the creation of forms. So of which need be added to charts on a daily basis. The main objective of this software is to reduce the amount of time required to prepare forms for charts and to reduce the errors in preparing the forms.

Interface Overview

- Below is what you will see when you first launch the Chart Form Creator 4.0 application.

Print: When you are done adding name this prints the forms.

Shortcut: Ctrl + P

Add New: Used to add a new patient to the repository of patients.

Shortcut: Ctrl + N

Edit: Used to modify an existing patient's name.

Shortcut: Ctrl + E

Delete: Used to remove an existing patient's from the repository of patients.

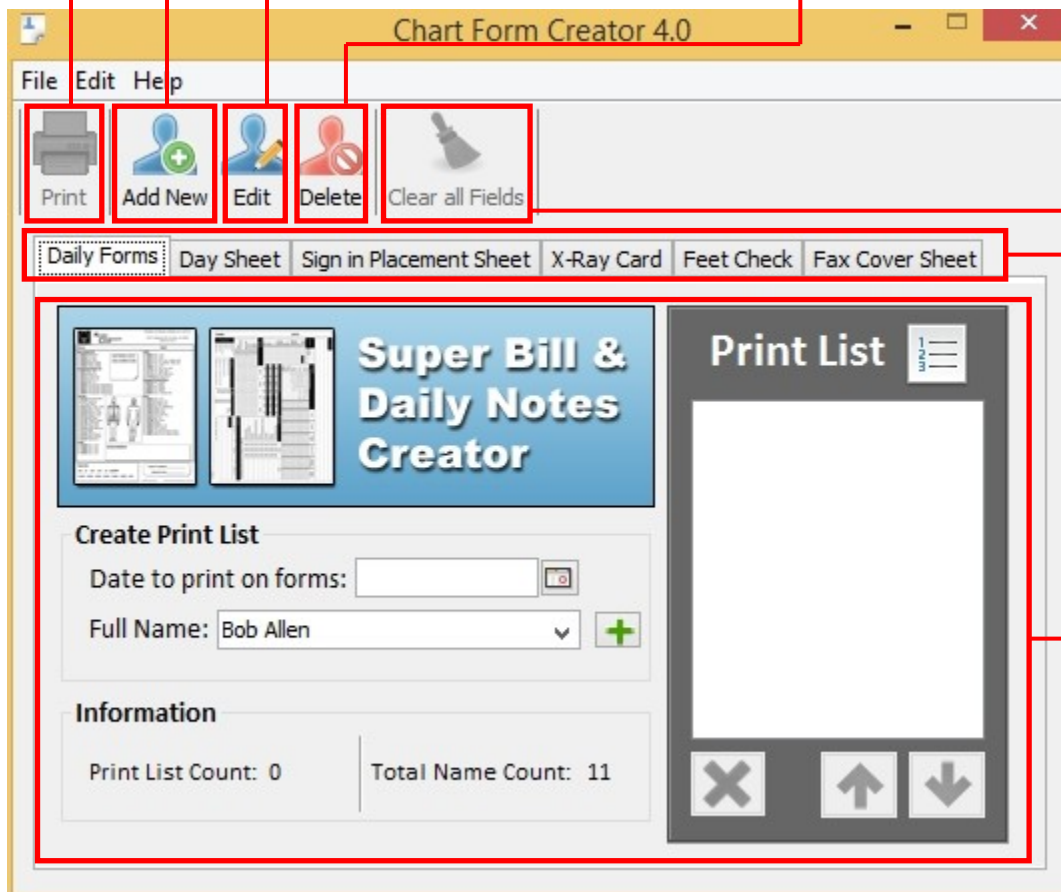
Shortcut: Ctrl + D

Clear all Fields: Clears all the data fields on the currently selected form.
Note: Not available on all forms.

Shortcut: Ctrl + L

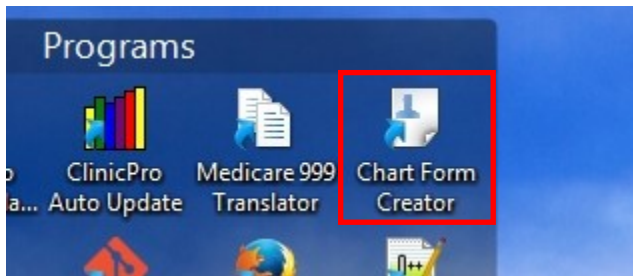
Form Tabs: Used to navigate between forms. Click on the form you would like to create.

Form Creation Area: This area will change depending on the form tab you have selected.

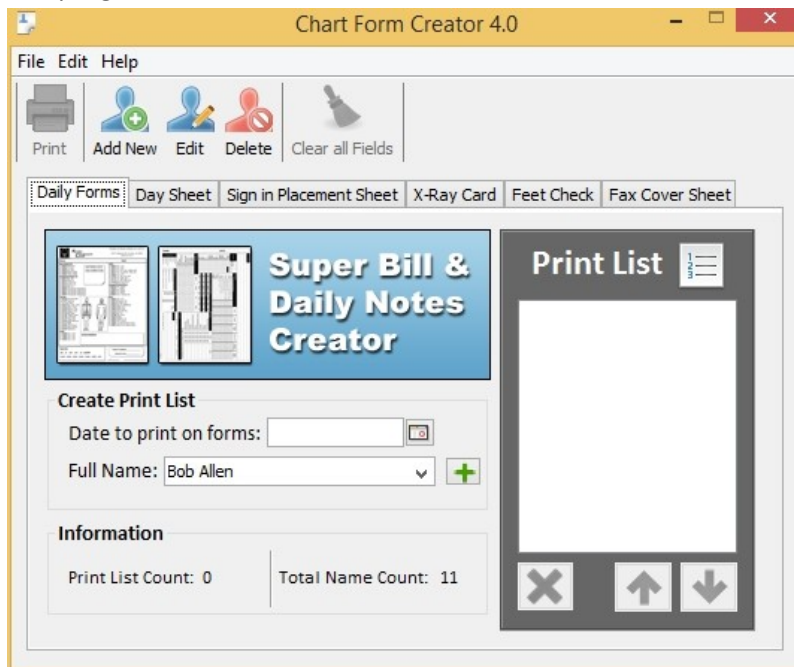


Starting the Application

1. To start the program simply double left click on the **Chart Form Creator 4.0** icon. This icon should be located on your desktop.



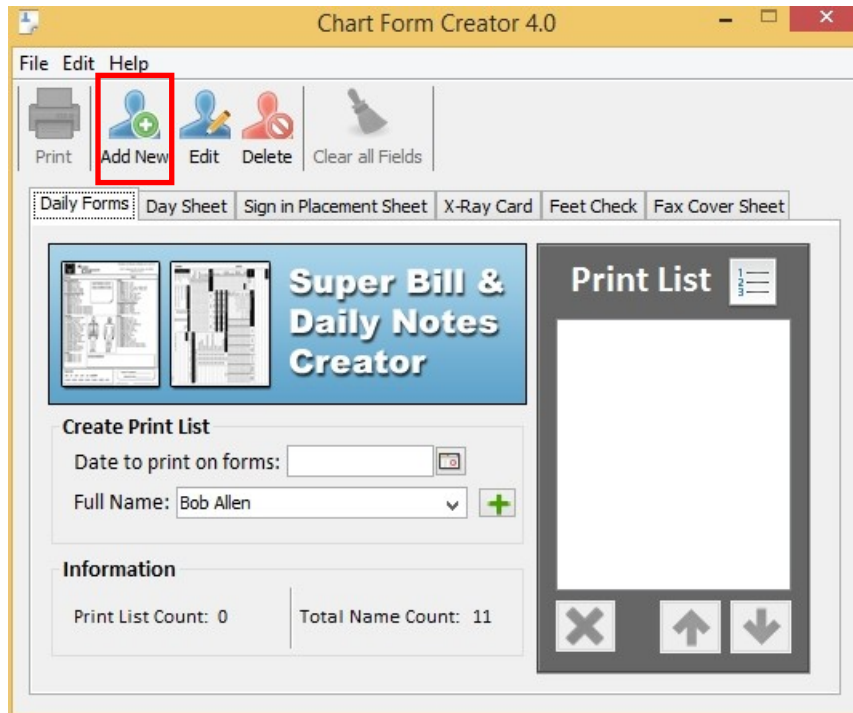
2. The program will start.



Add a New Patient

If you cannot find the name you are looking for you may need to add it to the repository of patient names.

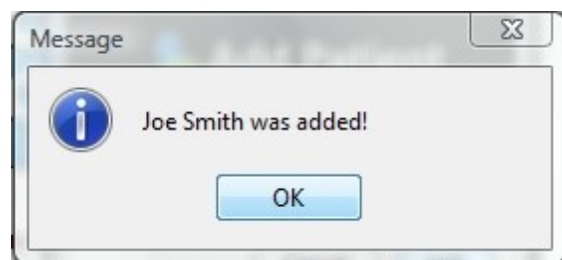
1. Click on the Add New button.



2. The Add New screen will appear. Type in the patient's first and last name in the corresponding boxes.

3. Click the add button.

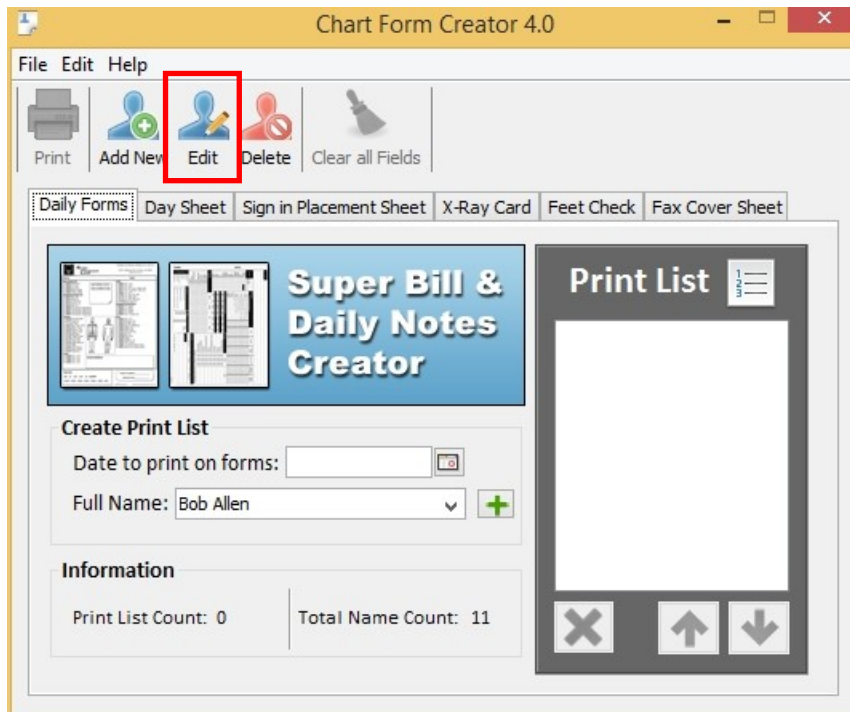
You will see a confirmation that the patient has been added.



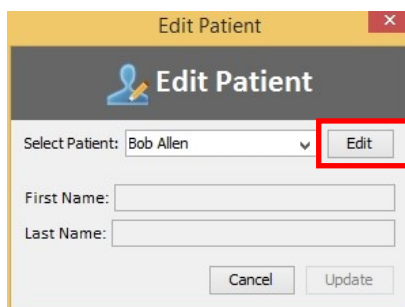
Edit an Existing Patient

If during the process of adding a new patient you save the incorrect name or in the event that a patient changes their name, you can edit an existing patient's name.

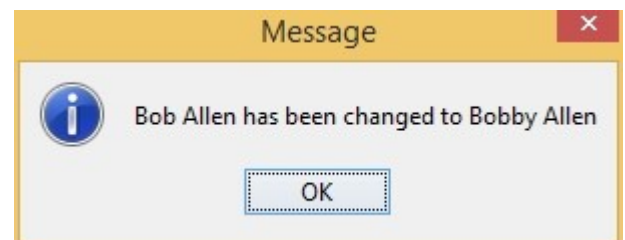
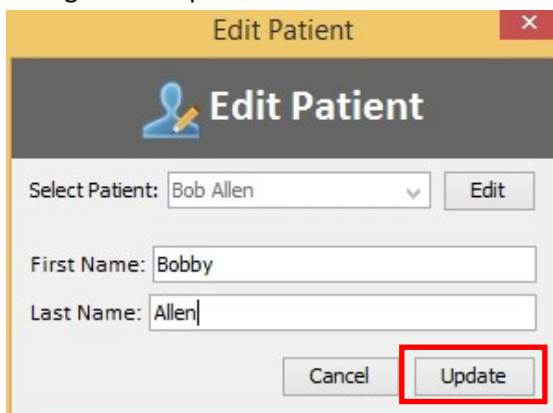
1. Click on the Edit button.



2. The Edit screen will appear. Select the patient you wish to edit. Once the patient's name is in the name box click edit.

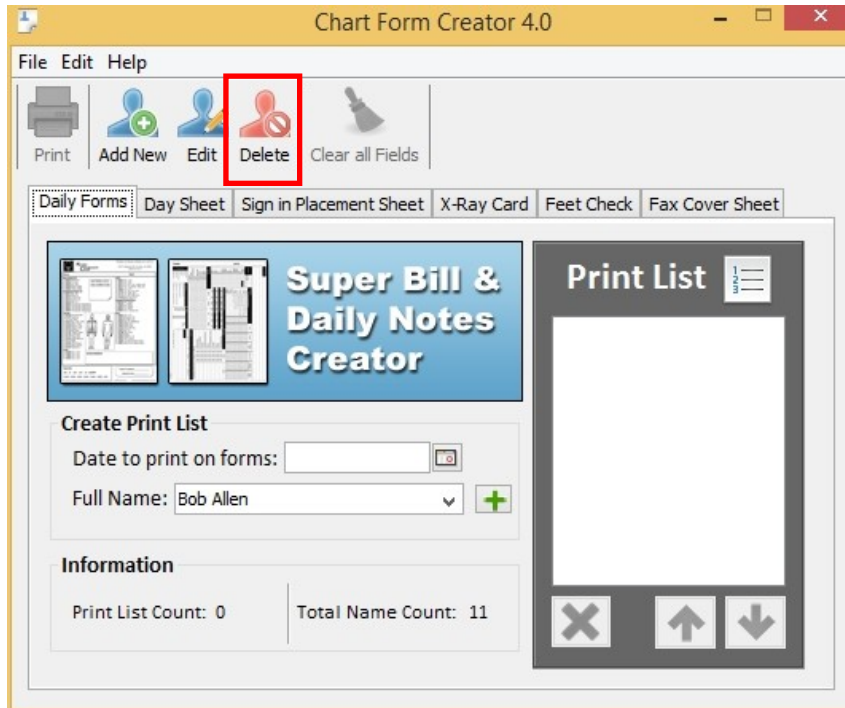


3. Once you click the edit but you will not long be able to change which patient to edit. Make the appropriate changes to the patient's name and then click the Update button. You will then see a confirmation.

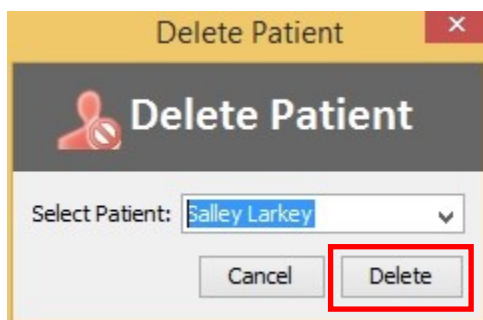


Delete a Patient

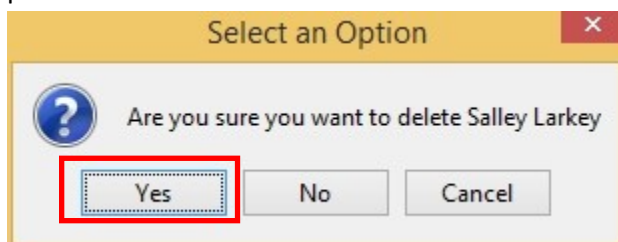
1. Click the Delete button.



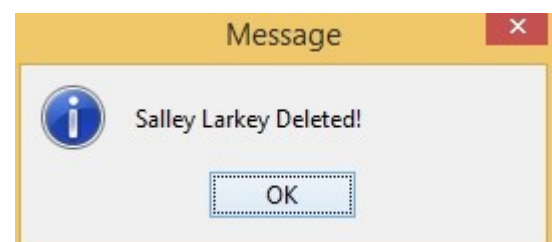
2. The Delete screen will appear. Select the patient you wish to delete. This is done in the same way that you select a patient to add to the print list. (See page 3 for detail on how to do this) Once the patient's name is in the name box click Delete.



3. A screen will appear asking you to confirm that you want to delete the selected patient. Click yes to delete the patient.



You will then see a confirmation.



Daily Forms Tab

From this tab you are able to create a super bill and daily note form. These are the forms that are to be added to a patient's chart every time they come into the office for an appointment.

Overview

The screenshot shows the 'Chart Form Creator 4.0' application window. The 'Daily Forms' tab is selected, displaying a 'Super Bill & Daily Notes Creator' interface. A 'Print List' window is open, showing a list of patients. Red boxes highlight specific features, with callout boxes providing detailed explanations.

Add: Adds the name current in the name box to the print list.

Print List: This is the area that show which patients will be part of the print batch.

Up/Down Controls: Used to move patients in the list up or down.

Remove Selected: Used to remove a selected patient from the print list.

Date: Allows you to select a date by clicking on the calendared icon.
Caution: You must select a date before you can print.

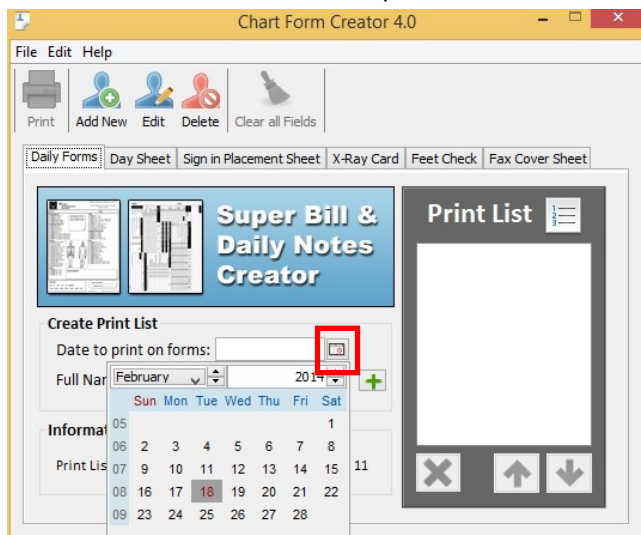
Name: You can choose a patient's name by typing in their name. For more information see page 3.

Print List Count: The number of patients currently in the Print List.

Total Name Count: The number of patients currently in the repository.

Creating a Print List

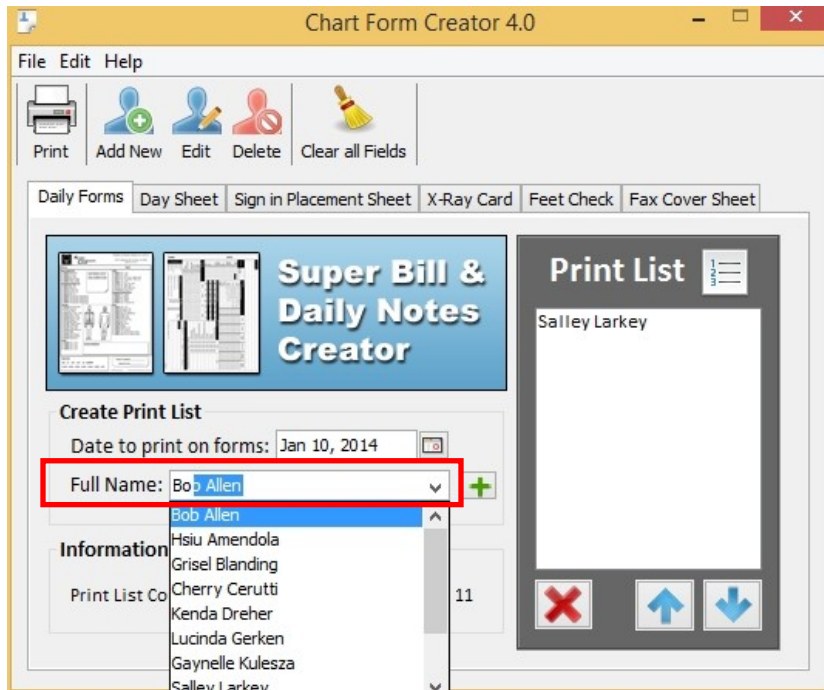
1. The first thing you will need to do is select the date that will be printed on the forms. Click the calendar button and select the date that will be printed on the forms.



- NOTE -

The date you select will be the date printed on all the forms.

2. To add a patient to the Print List, simply start to type their name (first name followed by last name) into the Full Name box. As you type you will see suggested names appear in the box.
 - a. When the correct name is displayed in the full name box you can hit the enter key on the keyboard to add them to the Print List, or you can click the plus button to add them to the print list.



3. A second way to add a name to the print list is to click on the down arrow and select the name from the drop down list.
 - a. After you select the name you want, click the plus button to add them to the print list.

The screenshot shows the 'Chart Form Creator 4.0' application window. The 'Create Print List' dialog box is open, displaying a date field set to 'Jan 10, 2014' and a 'Full Name' dropdown menu. The dropdown menu is open, showing a list of names: 'Bob Allen', 'Hsiu Amendola', 'Grisel Blanding', 'Cherry Cerutti', 'Kenda Dreher', 'Lucinda Gerken', 'Gaynelle Kulesza', and 'Salley Larkey'. A red box highlights the down arrow button next to the 'Full Name' field. To the right of the dropdown is a green plus button. Below the dropdown is a scroll bar with the number '11'. The 'Print List' panel on the right shows 'Salley Larkey' and has buttons for 'X', 'up arrow', and 'down arrow'.

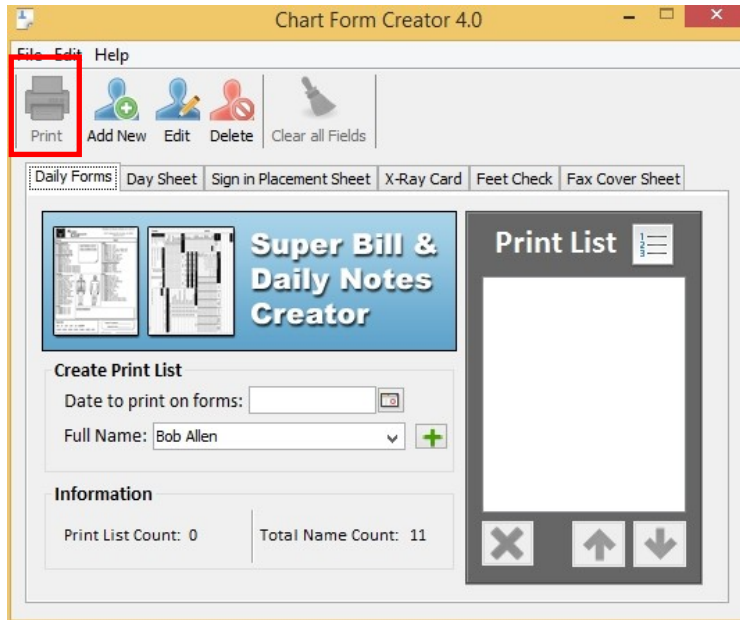
- NOTE -

If you cannot find the name you are looking for you may need to add it to the repository of patient names. See page 3 to find out how to do this.

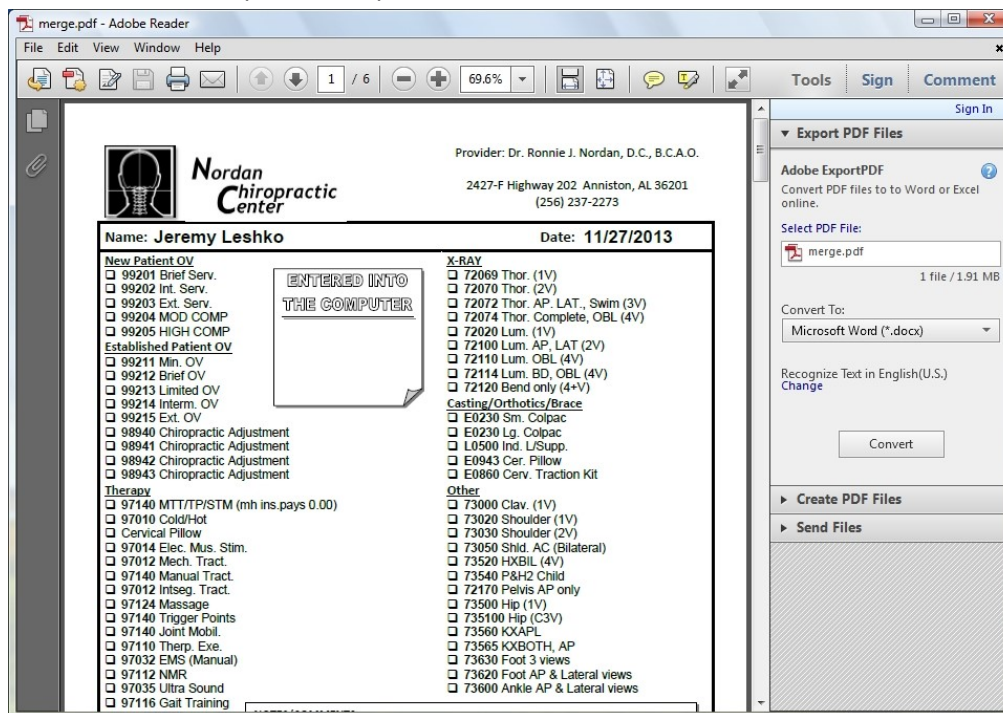
Printing Daily Forms

When you have added all the patient's names to the print list for which you want to create forms for, it is now time to print.

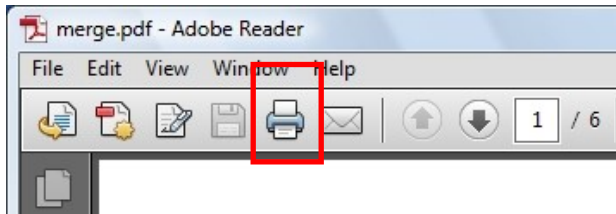
1. Before printing make sure that you have a date selected. If not see page 7.
2. Click the print button.



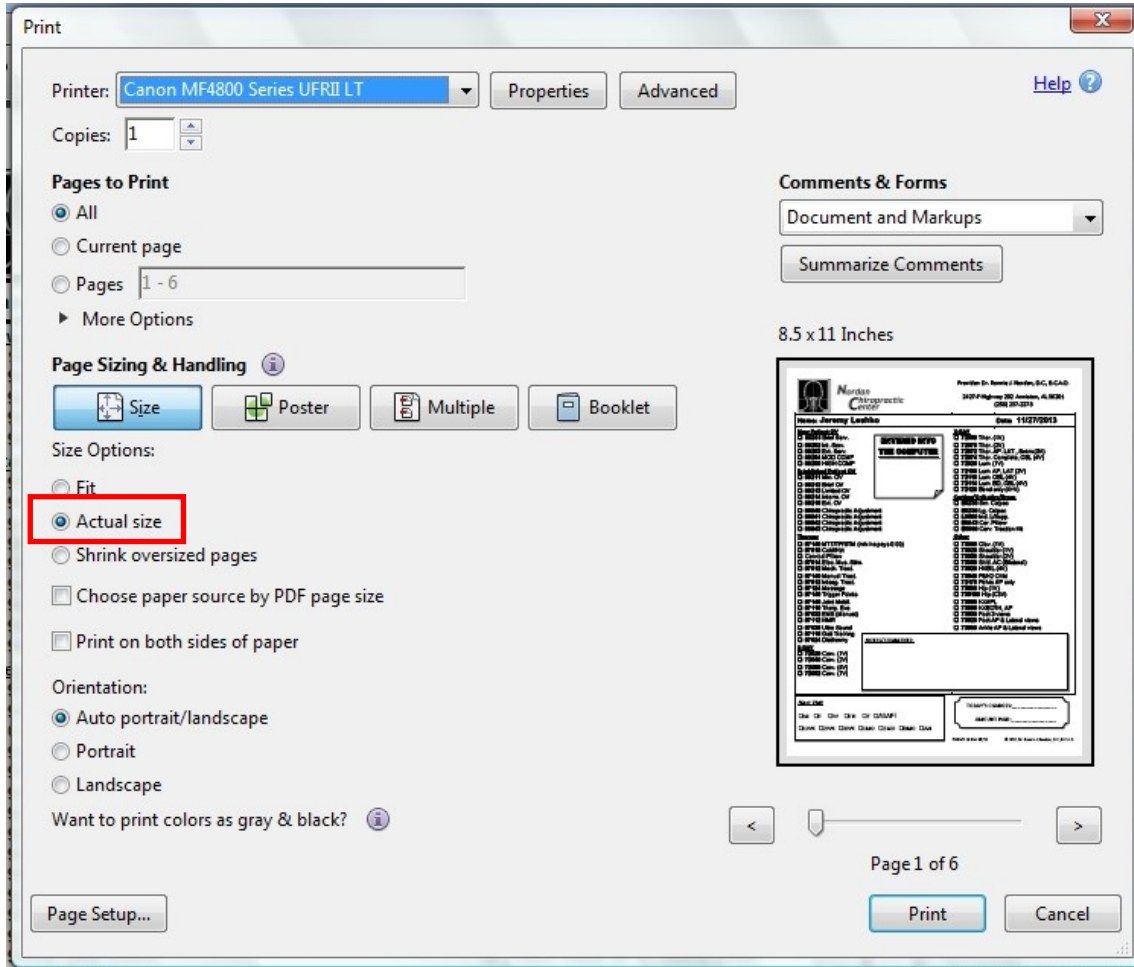
3. Adobe Reader will open with a preview of the forms that have been created.



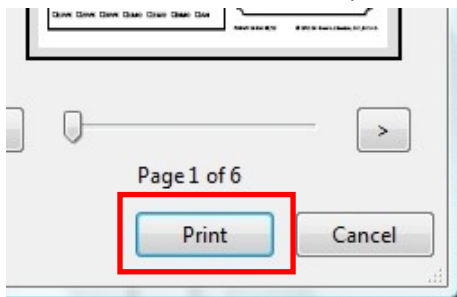
4. If the forms are correct click the print button in Adobe Reader.



5. A print option screen will open. Make sure under the heading size options, that actual size is selected.



6. Click the Print button to complete the printing process.



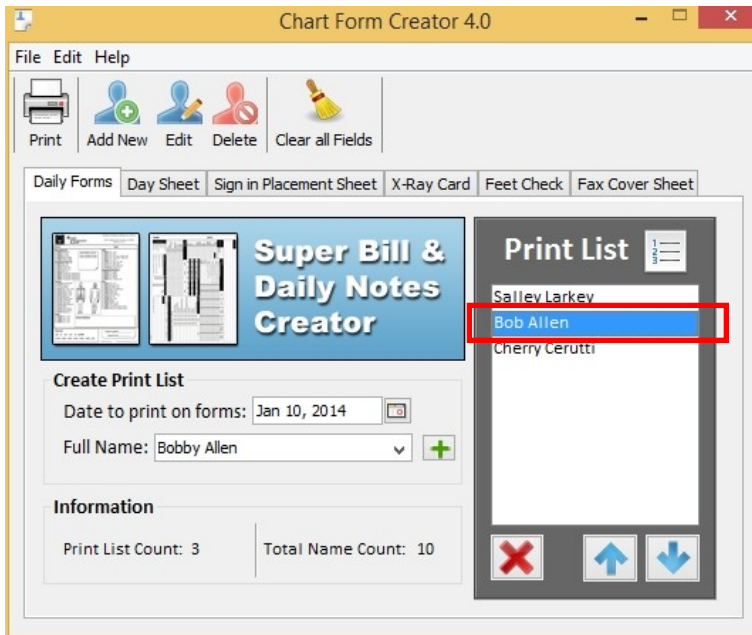
- NOTE -

After printing make sure to close out of Adobe Read.

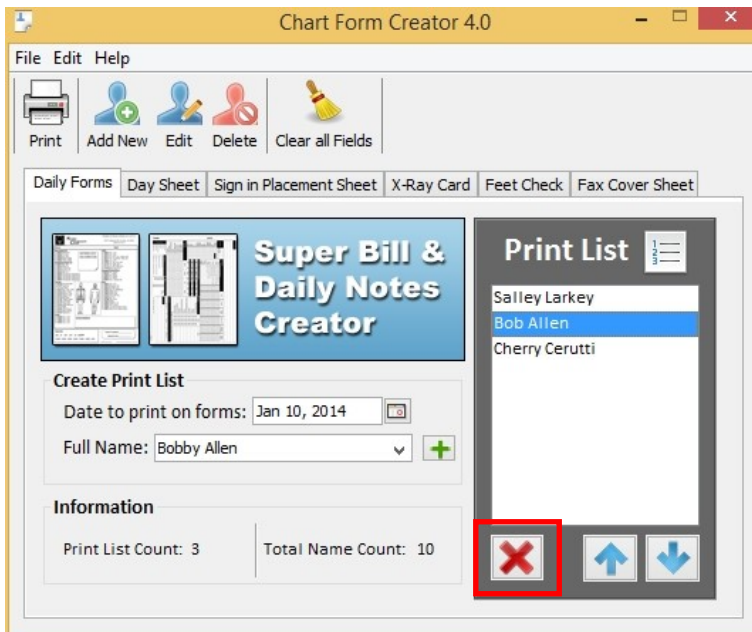
Removing a Patient from the Print List

If during the process you add a name to the Print List that you did not intend to, you can remove it from the Print List.

1. Click on the name you want to remove from the Print List.



2. Click the Remove Selected button to remove this name from the print list.



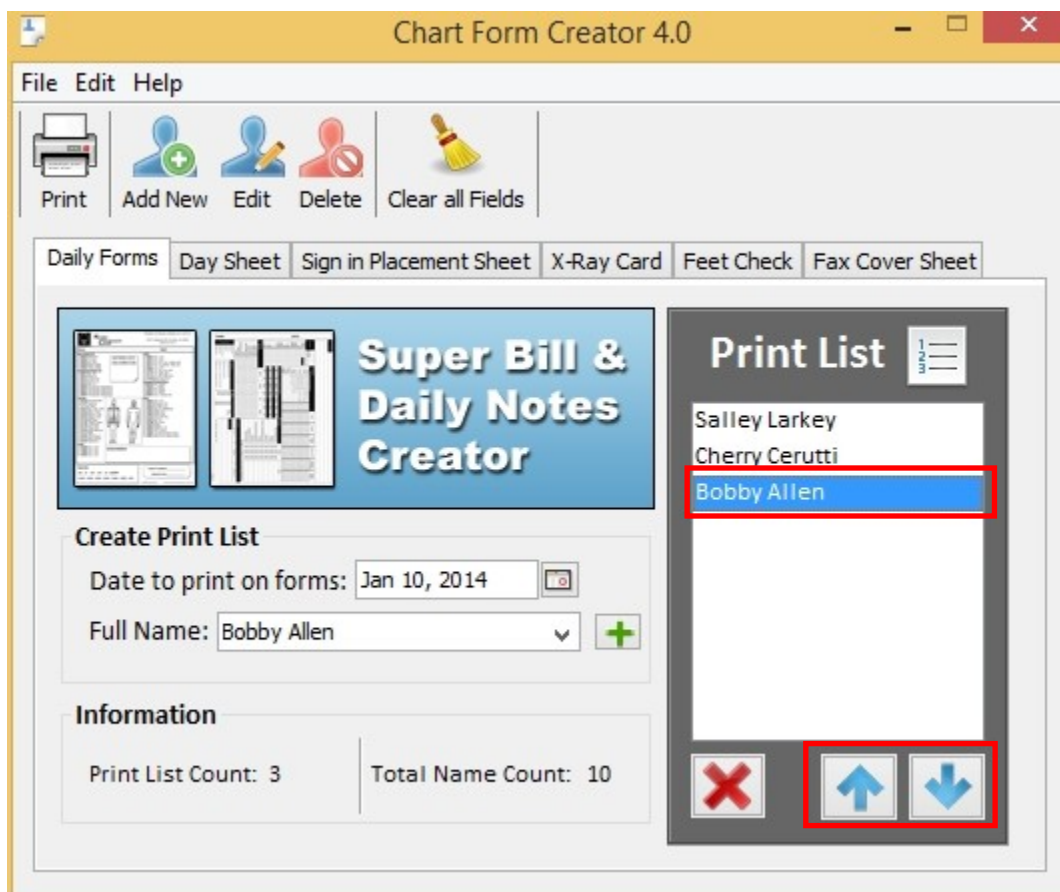
3. You will see the name has been removed.



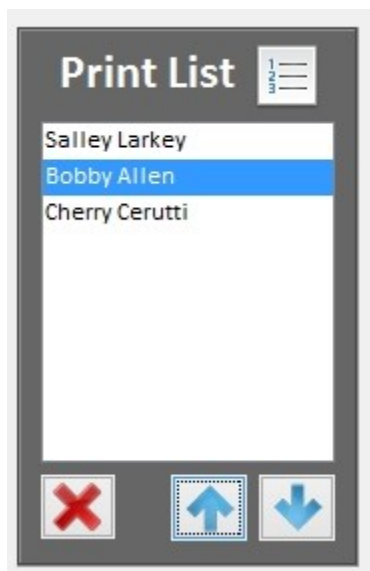
Changing the Order of Patients in the Print List

You can change the order of the Patients in the Print List. This may be desirable since, the order the Patients are in the Print List is the order the forms will be printed in.

1. Start by selecting the Patient in the Print List that needs to be moved. This is done by simply clicking on the Patient's name.



2. Now use the Up or Down buttons to change the position of the Patient. In this example we moved the patient Bobby Allen, up one position.



Day Sheet Tab

From this tab you are able to print day sheets for a work week.

Overview

The screenshot shows the 'Chart Form Creator 4.0' application window. The 'Day Sheet' tab is selected in the top menu bar. The main area displays a large 'Day Sheet Creator' title and a preview of a day sheet form. Below the preview, there is a text field labeled 'The Date Monday Falls On:' with a calendar icon to its right. At the bottom, there is a 'Day Selector' section with checkboxes for the days of the week: Monday, Tuesday, Wednesday, Thursday, and Friday. Monday, Tuesday, Wednesday, and Friday are checked, while Thursday is unchecked.

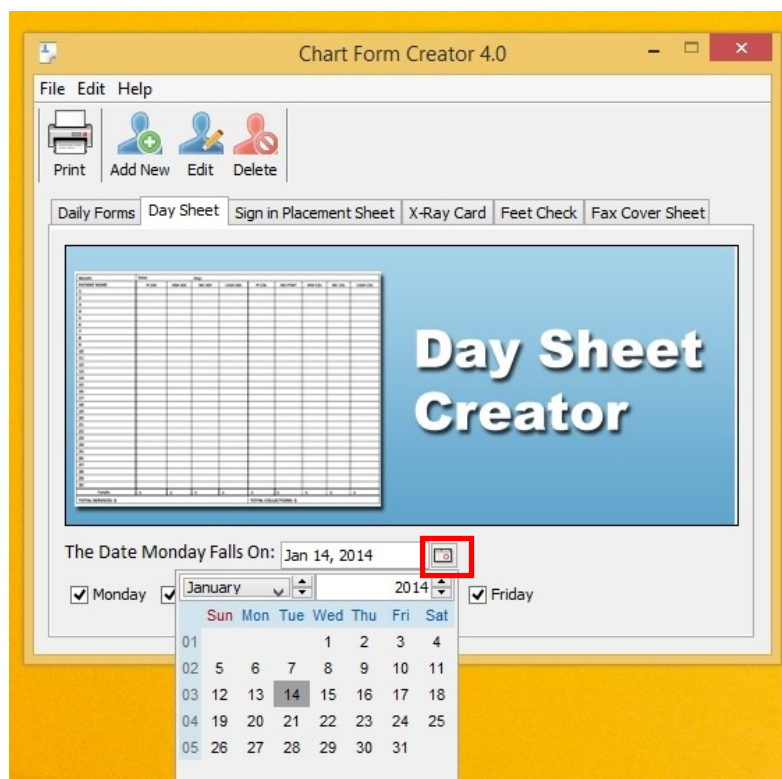
Monday	Tuesday	Wednesday	Thursday	Friday
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Date: Allows you to select a date by clicking on the calendared icon.

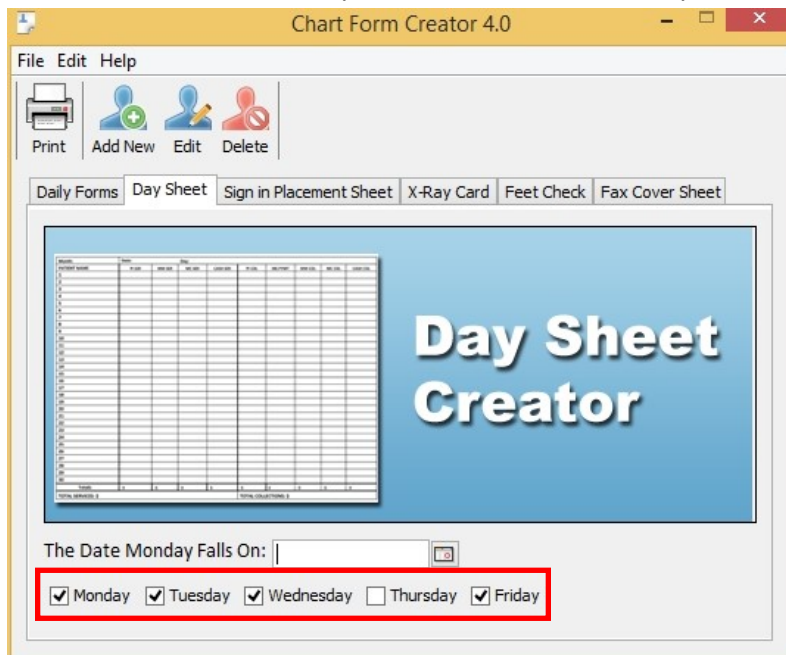
Day Selector: The days of the week for which you would like to create day sheets for. By default Monday, Tuesday, Wednesday, and Friday is selected.

Creating a Day Sheet

1. The first thing you will need to do is select the date that will be printed on the forms. Click the calendar button and select the date that will be printed on the forms.

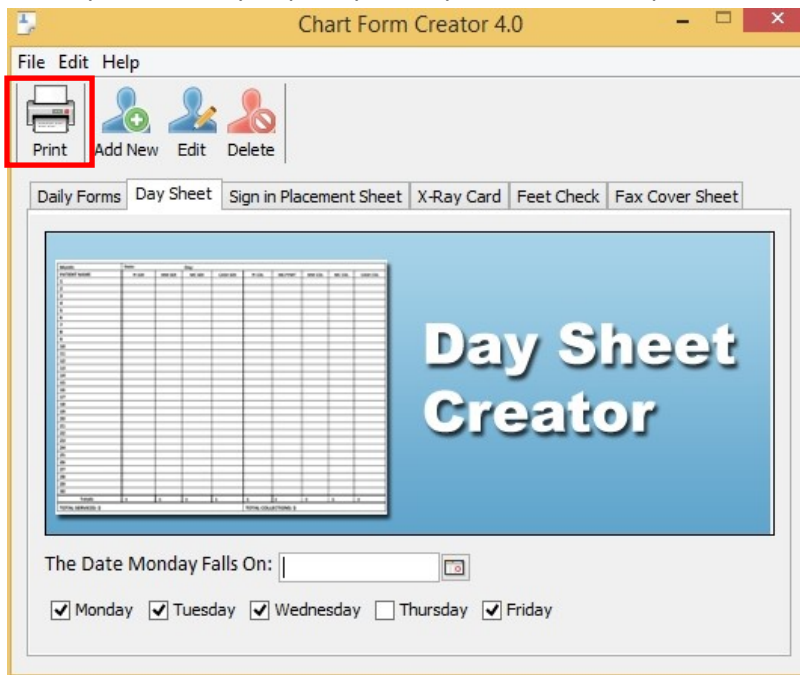


2. If the defaults are not what you need, then select the day of the week you need.

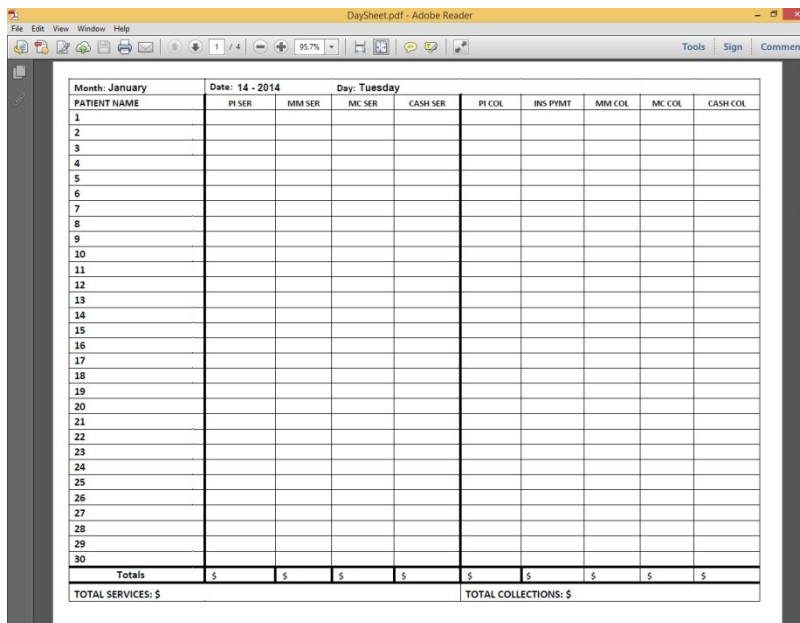


Print a Day Sheet

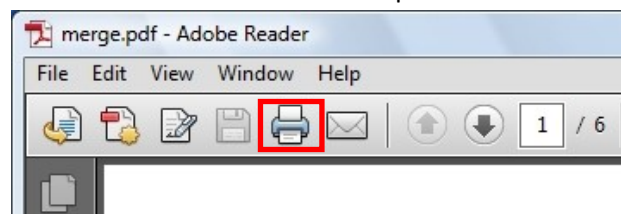
1. When you are ready to print your day sheets click the print button.



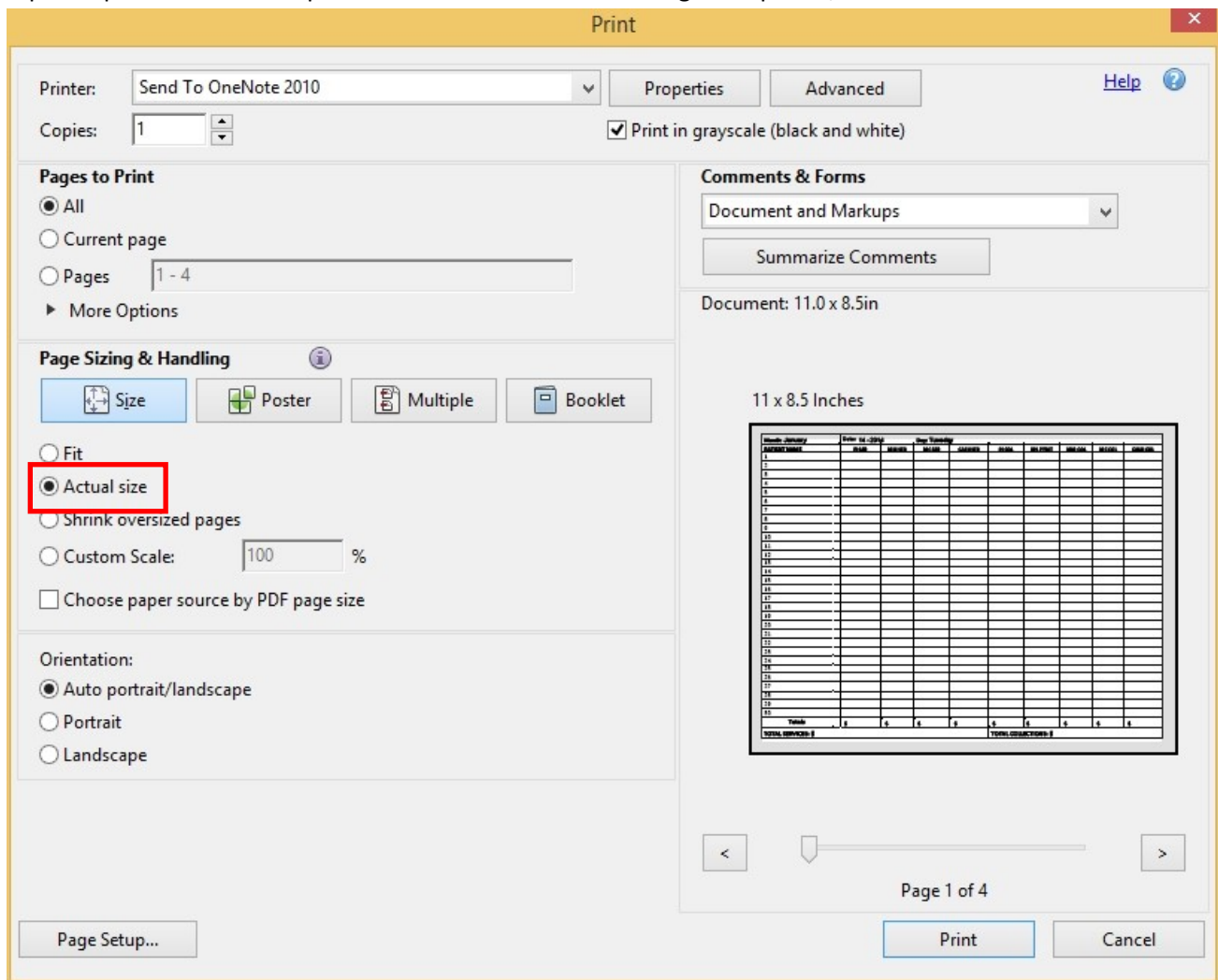
2. Adobe Reader will open with a preview of the forms that have been created.



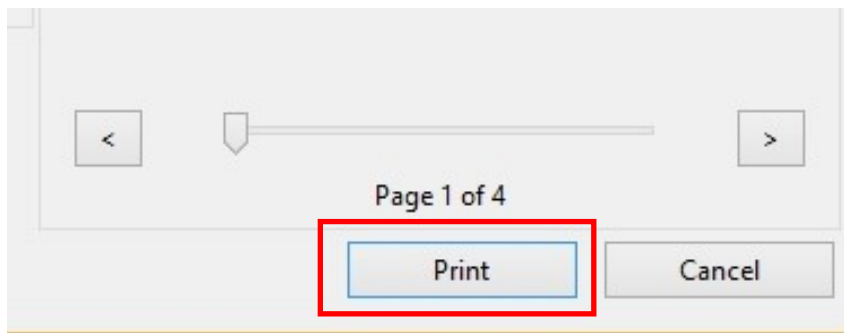
3. If the forms are correct click the print button in Adobe Reader.



4. A print option screen will open. Make sure under the heading size options, that actual size is selected.



5. Click the Print button to complete the printing process.



- NOTE -

After printing make sure to close out of Adobe Read.

Sign in Placement Sheet Tab

From this tab you are able to print sign in placement sheets for a work week.

Overview

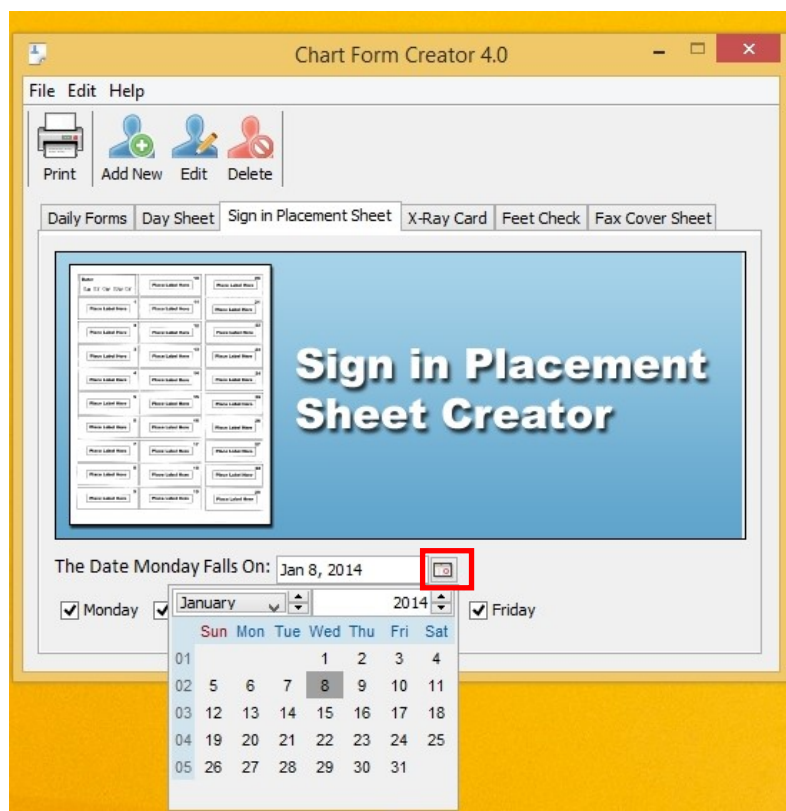
The screenshot shows the 'Chart Form Creator 4.0' application window. The title bar is yellow with standard window controls. The menu bar includes 'File', 'Edit', and 'Help'. Below the menu bar is a toolbar with icons for 'Print', 'Add New', 'Edit', and 'Delete'. A tabbed interface is present, with the 'Sign in Placement Sheet' tab selected and highlighted with a dotted border. Other tabs include 'Daily Forms', 'Day Sheet', 'X-Ray Card', 'Feet Check', and 'Fax Cover Sheet'. The main content area is divided into two sections. On the left is a grid of 30 small rectangular boxes, each labeled 'Photo Label Here' with a number (1-30). On the right is a large blue rectangular area with the text 'Sign in Placement Sheet Creator' in a large, bold, white font. At the bottom of the window, there is a section titled 'The Date Monday Falls On' followed by a date input field and a calendar icon. Below this is a 'Day Selector' row with checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday'. The 'Monday', 'Tuesday', 'Wednesday', and 'Friday' checkboxes are checked, while 'Thursday' is unchecked.

Date: Allows you to select a date by clicking on the calendared icon.

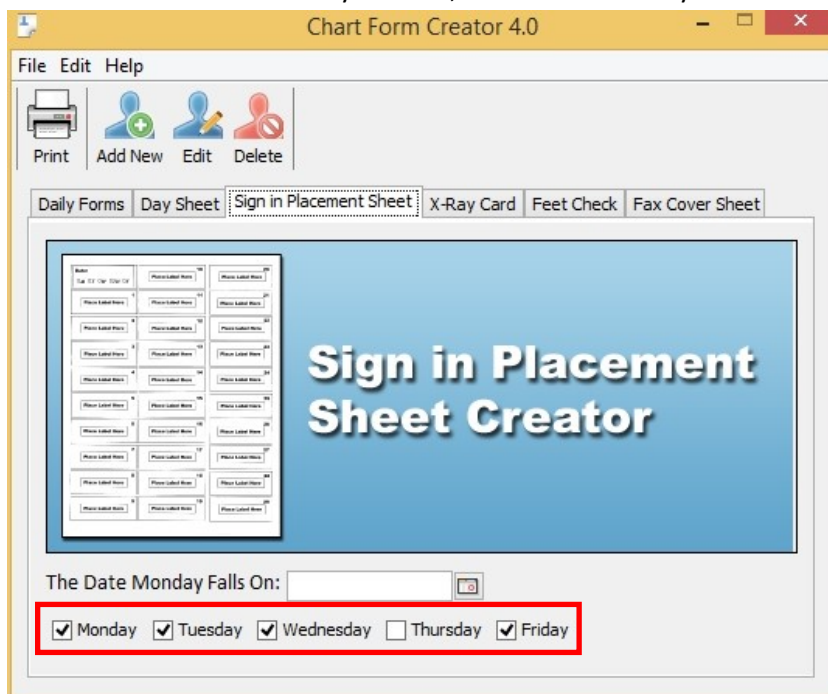
Day Selector: The days of the week for which you would like to create day sheets for. By default Monday, Tuesday, Wednesday, and Friday is selected.

Creating a Sign in Placement Sheet

1. The first thing you will need to do is select the date that will be printed on the forms. Click the calendar button and select the date that will be printed on the forms.

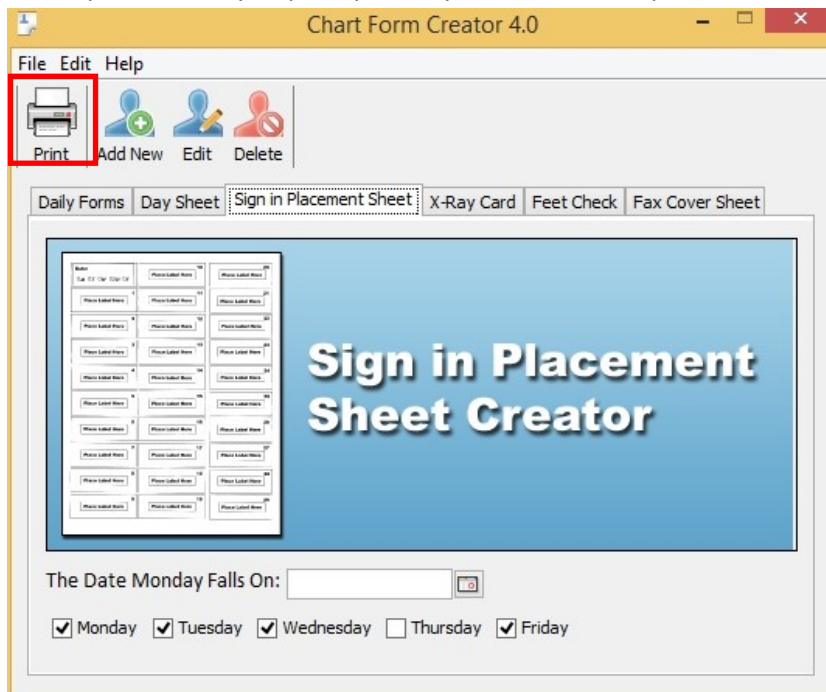


2. If the defaults are not what you need, then select the day of the week you need.

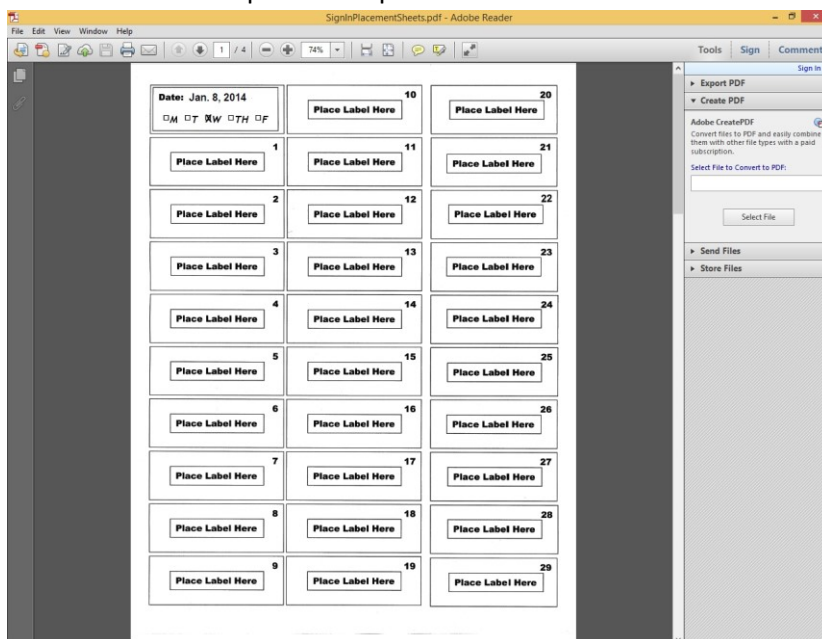


Printing a Sign in Placement Sheet

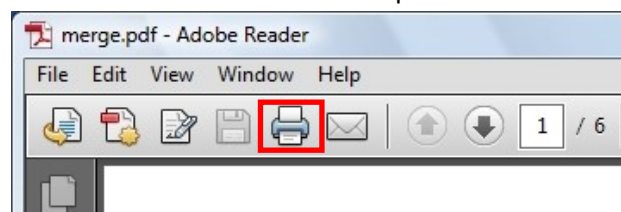
1. When you are ready to print your day sheets click the print button.



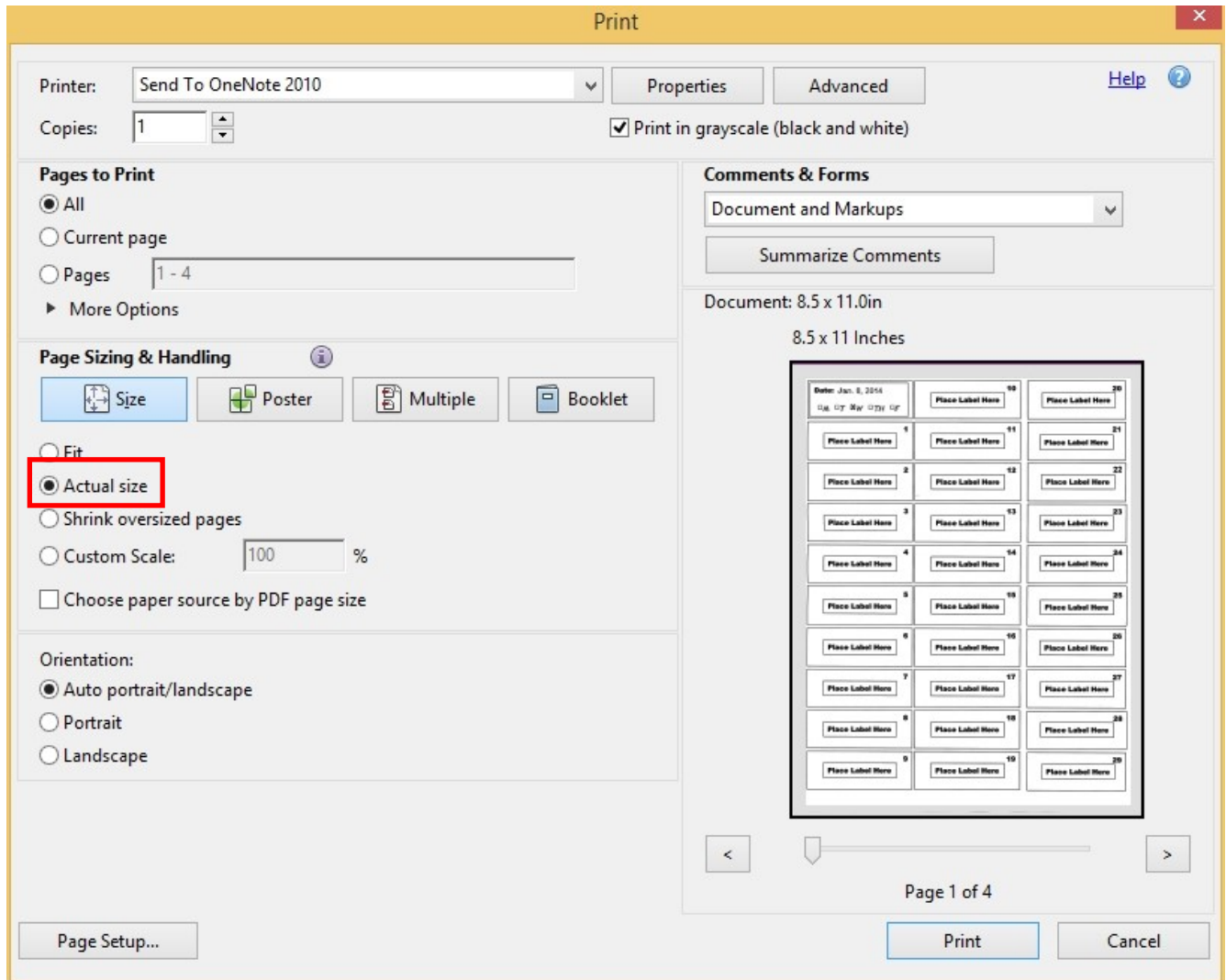
2. Adobe Reader will open with a preview of the forms that have been created.



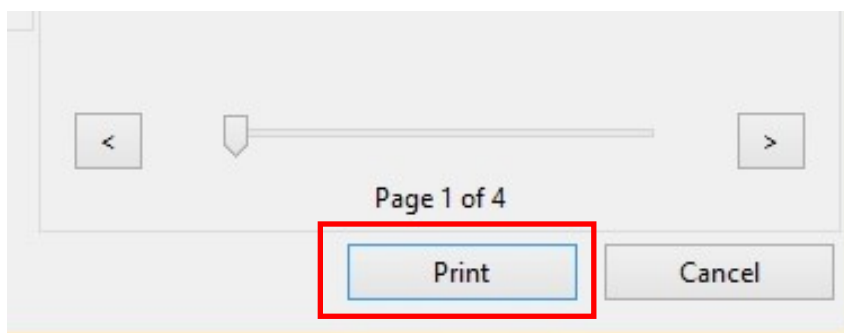
3. If the forms are correct click the print button in Adobe Reader.



4. A print option screen will open. Make sure under the heading size options, that actual size is selected.



5. Click the Print button to complete the printing process.



- NOTE -

After printing make sure to close out of Adobe Read.

X-Ray Card Tab

From this tab you can create and print an X-Ray Card.

Overview

Chart Form Creator 4.0

File Edit Help

Print Add New Edit Delete

Daily Forms Day Sheet Sign in Placement Sheet **X-Ray Card** Feet Check Fax Cover Sheet

X-Ray Card Creator

Patient Information

Full Name: Date of Birth:

X-Ray Information

Exam Type: X-Ray Date:

Date of Birth: Type the patient's date of birth.
Format ex: 11/13/1988

Exam Type: Selected the exam type, pre. or post

Name: You can choose a patient's name by typing in their name. For more information see page 3.

X-Ray Date: Allows you to select a date by clicking on the calendared icon.

Creating a X-Ray Card

1. First you need to choose the patient you want to create an X-ray card for. Start to type their name (first name followed by last name) into the Full Name box. As you type you will see suggested names appear in the box.

The screenshot shows the 'Chart Form Creator 4.0' application window. The 'X-Ray Card' tab is selected. The 'Patient Information' section has a 'Full Name' field with a red box around it containing 'Kim Anniston'. A dropdown menu is open below the field, showing three suggestions: 'Kim Anniston' (highlighted in blue), 'Jim Bob', and 'Bobby Smith'. The 'Date of Birth' field is empty with a placeholder ' / /'. The 'Exam Type' dropdown is set to 'Pre.' and the 'X-Ray Date' field is empty with a calendar icon.

2. A second way to add find a name is to click on the down arrow and select the name from the drop down list.

This screenshot is identical to the one above, showing the 'Chart Form Creator 4.0' application window with the 'X-Ray Card' tab selected. The 'Full Name' field contains 'Kim Anniston' and the dropdown menu is open, showing the same three suggestions: 'Kim Anniston' (highlighted), 'Jim Bob', and 'Bobby Smith'.

- NOTE -

If you cannot find the name you are looking for you may need to add it to the repository of patient names. See page 3 to find out how to do this.

3. Type in the patient's data of birth mm/dd/yyyy

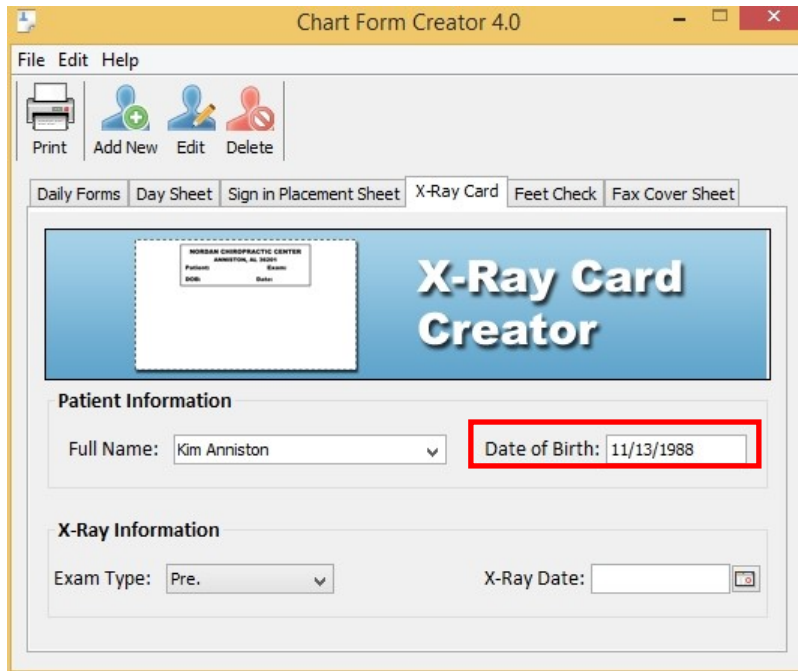


Chart Form Creator 4.0

File Edit Help

Print Add New Edit Delete

Daily Forms Day Sheet Sign in Placement Sheet X-Ray Card Feet Check Fax Cover Sheet

X-Ray Card Creator

Patient Information

Full Name: Kim Anniston Date of Birth: 11/13/1988

X-Ray Information

Exam Type: Pre. X-Ray Date:

4. Select the type of X-Ray exam type.

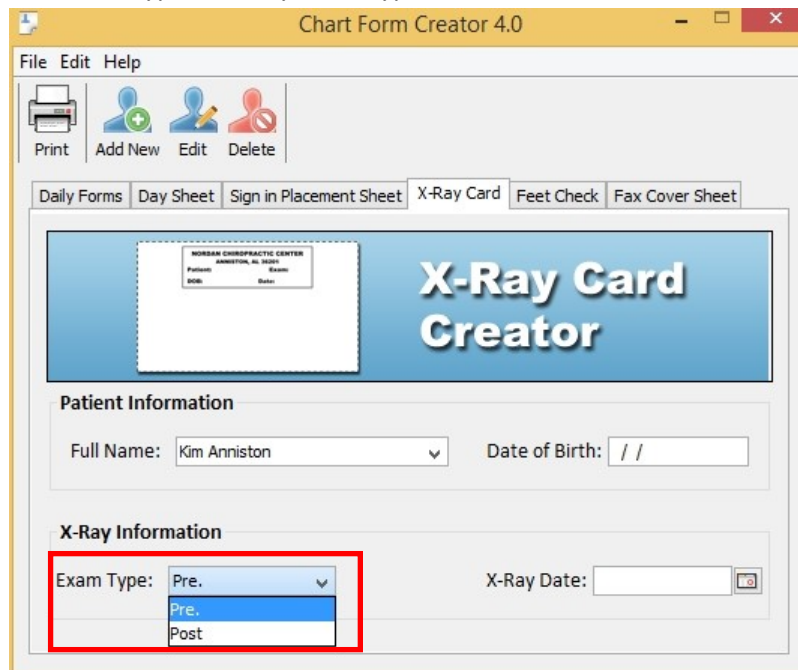


Chart Form Creator 4.0

File Edit Help

Print Add New Edit Delete

Daily Forms Day Sheet Sign in Placement Sheet X-Ray Card Feet Check Fax Cover Sheet

X-Ray Card Creator

Patient Information

Full Name: Kim Anniston Date of Birth: / /

X-Ray Information

Exam Type: Pre. Pre. Post

X-Ray Date:

5. Now select the data the X-Rays are to be taken on. Click the calendar button and select the date that will be printed on the forms.

Chart Form Creator 4.0

File Edit Help

Print Add New Edit Delete

Daily Forms Day Sheet Sign in Placement Sheet X-Ray Card Feet Check Fax Cover Sheet

X-Ray Card Creator

Patient Information

Full Name: Kim Anniston Date of Birth: 11/13/1988

X-Ray Information

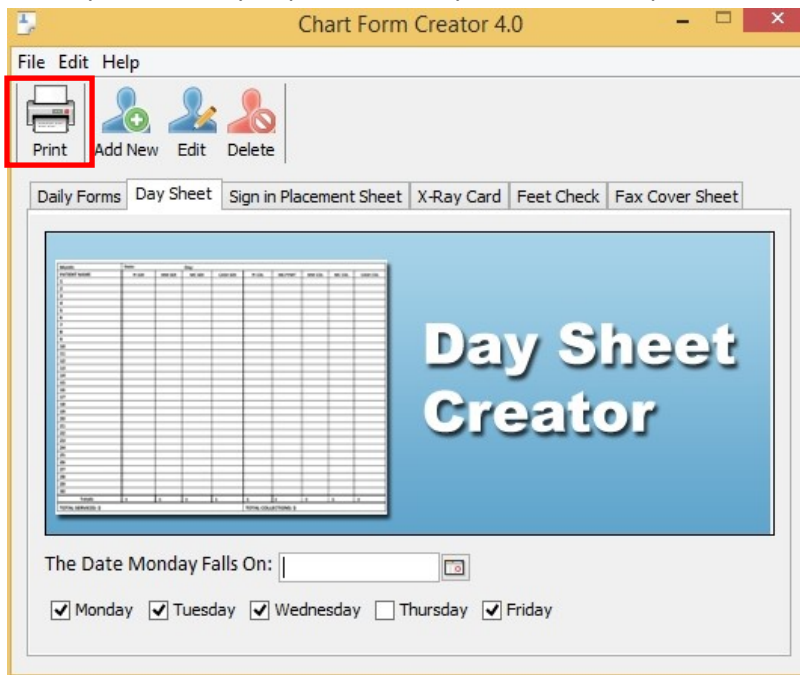
Exam Type: Pre. X-Ray Date: Jan 16, 2014

January 2014

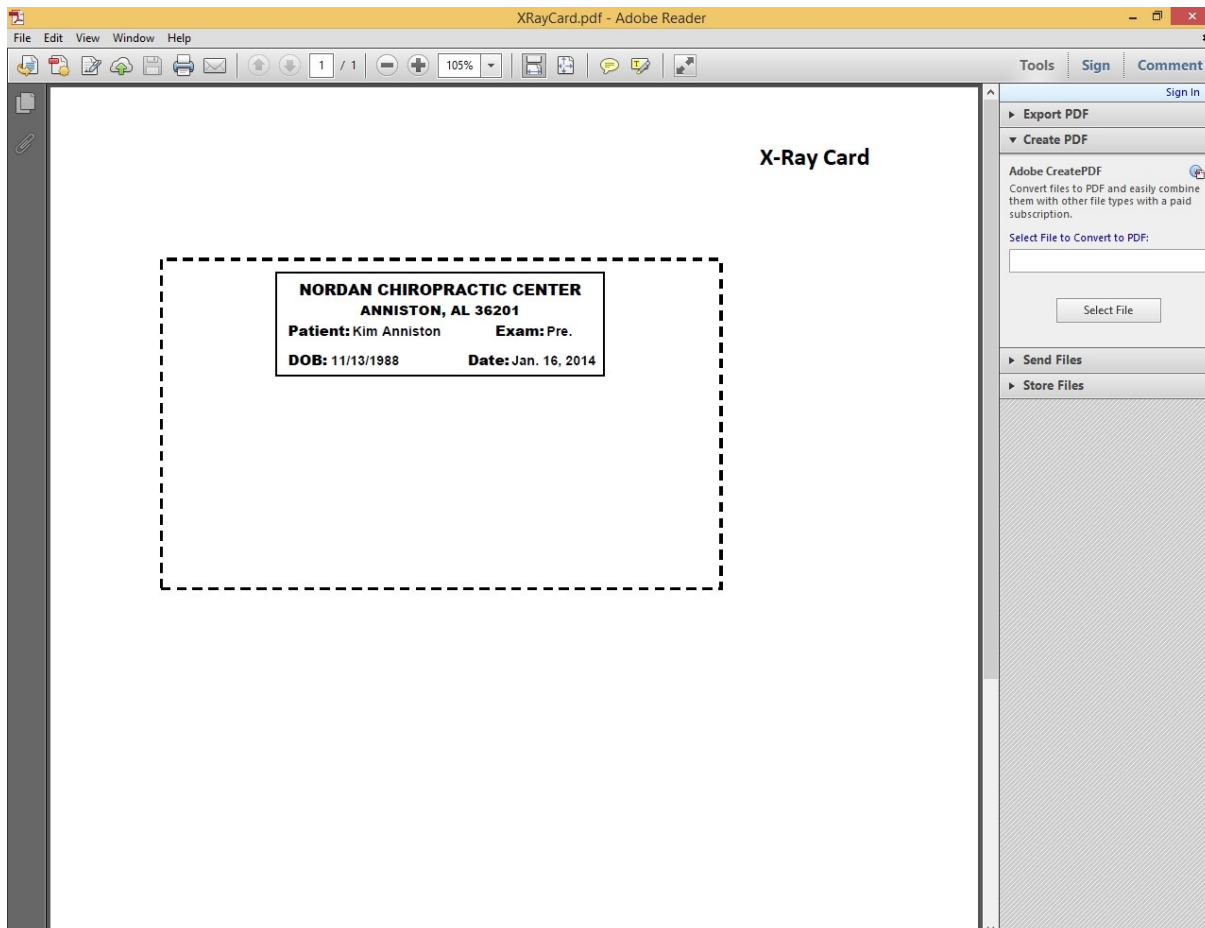
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
01				1	2	3	4
02	5	6	7	8	9	10	11
03	12	13	14	15	16	17	18
04	19	20	21	22	23	24	25
05	26	27	28	29	30	31	

Printing a X-Ray Card

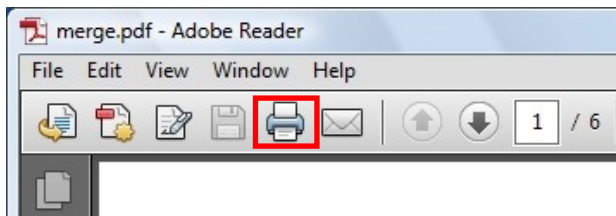
1. When you are ready to print the X-Ray card, click the print button.



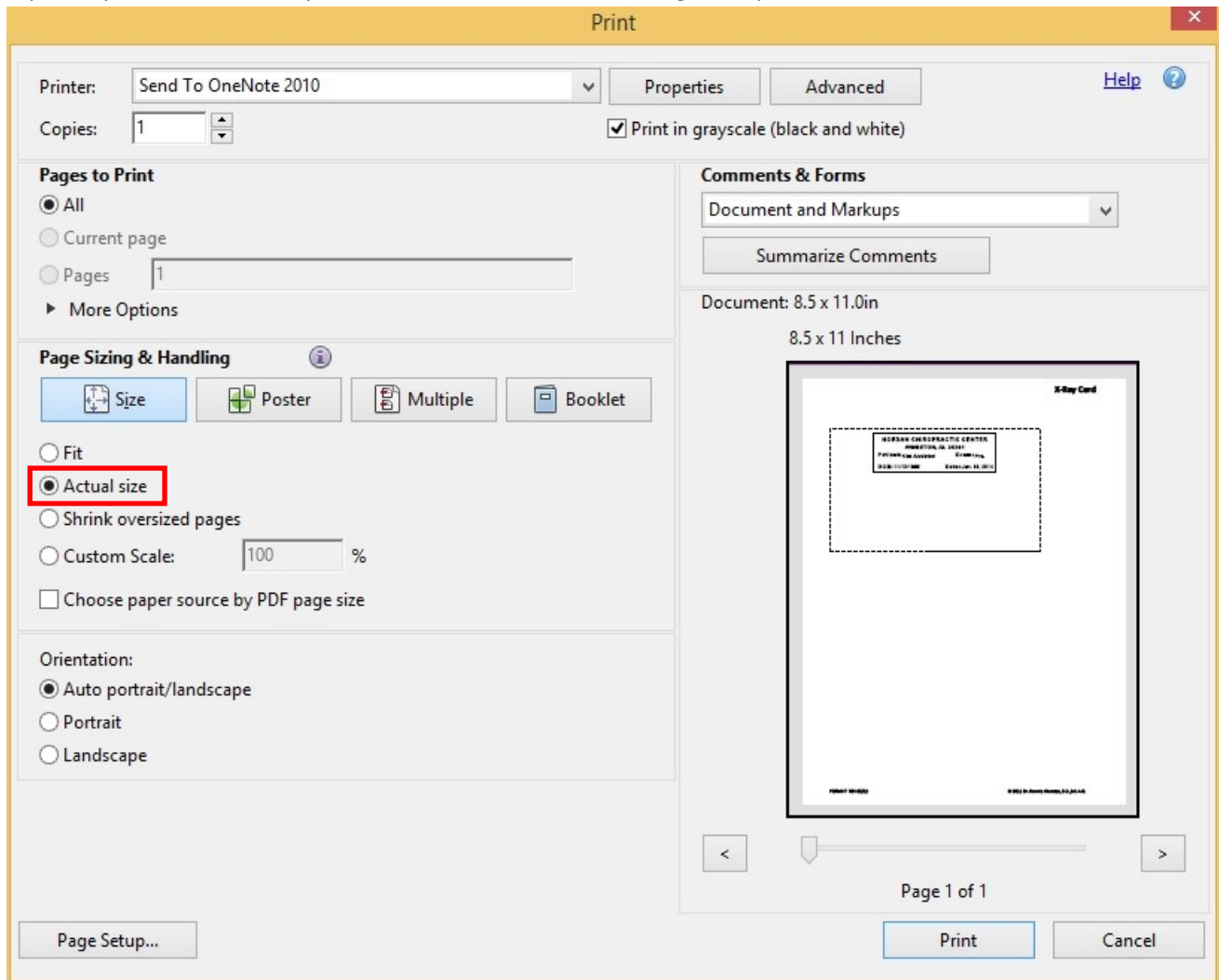
2. Adobe Reader will open with a preview of the forms that have been created.



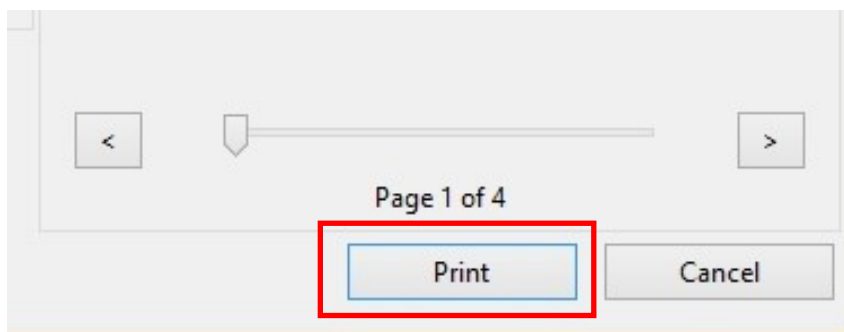
3. If the forms are correct click the print button in Adobe Reader.



4. A print option screen will open. Make sure under the heading size options, that actual size is selected.



5. Click the Print button to complete the printing process.



- NOTE -

After printing make sure to close out of Adobe Read.

Feet Check Tab

From this tab you can create a feet check form

Overview

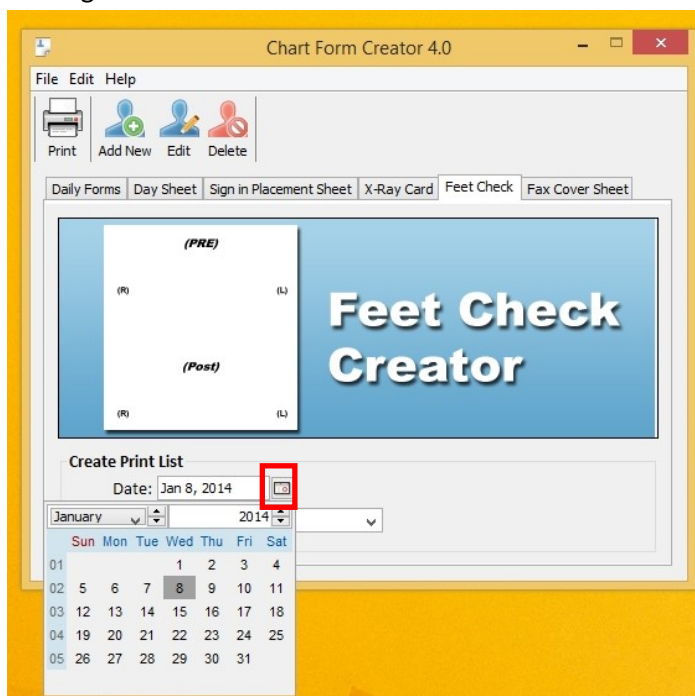
The screenshot shows the 'Chart Form Creator 4.0' application window. The title bar is yellow with standard window controls. The menu bar includes 'File', 'Edit', and 'Help'. Below the menu bar is a toolbar with icons for 'Print', 'Add New' (a person with a plus), 'Edit' (a person with a pencil), and 'Delete' (a person with a red X). A tabbed interface at the bottom of the toolbar shows 'Daily Forms', 'Day Sheet', 'Sign in Placement Sheet', 'X-Ray Card', 'Feet Check' (which is the active tab), and 'Fax Cover Sheet'. The main workspace has a light blue background with the text 'Feet Check Creator' in large white font. On the left, there is a white rectangular area representing a form, with '(PRE)' at the top, '(Post)' at the bottom, and '(R)' and '(L)' on the sides. Below the workspace is a 'Create Print List' section. It contains a 'Date:' label followed by a text input field and a calendar icon. Below that is a 'Full Name:' label followed by a text input field containing 'Kim Anniston' and a dropdown arrow. Red lines connect the calendar icon to a callout box on the right and the 'Full Name' field to a callout box at the bottom.

Date: Allows you to select a date by clicking on the calendared icon.

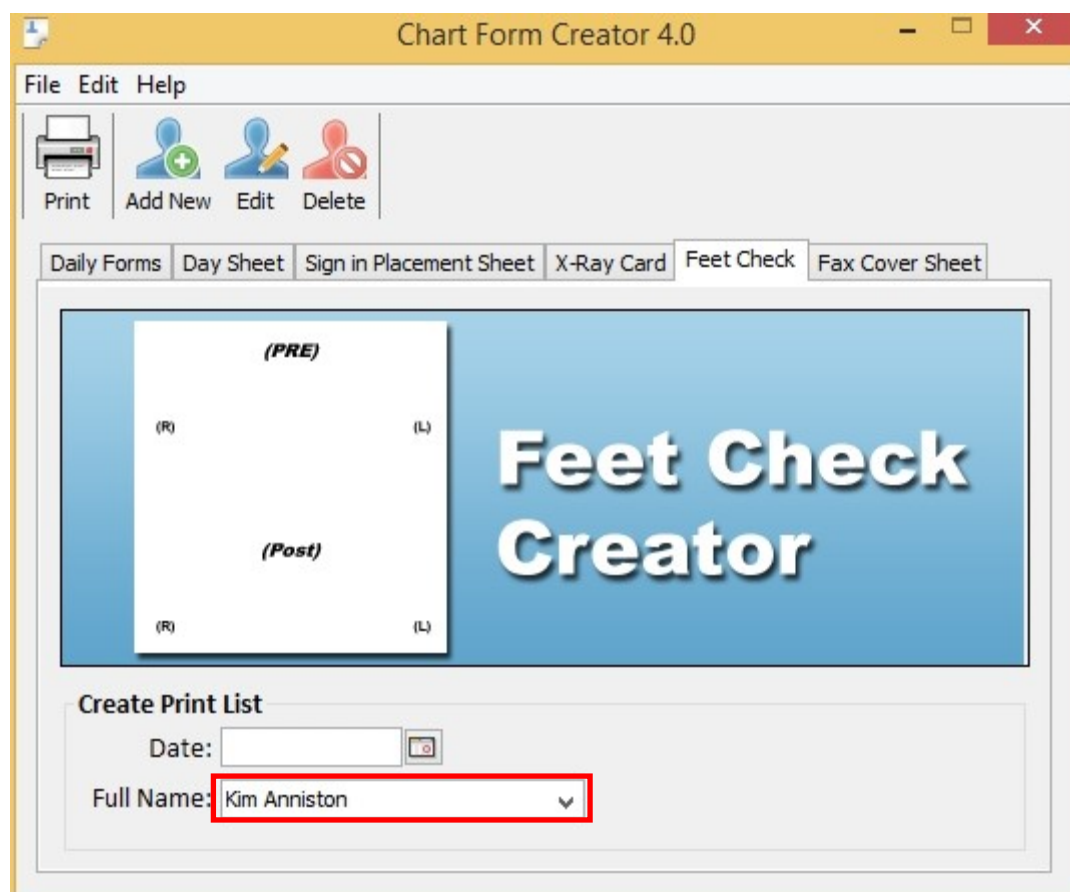
Name: You can choose a patient's name by typing in their name. For more information see page 3.

Creating a Feet Check Form

1. First select the date that needs to be printed on the form this is done by clicking on the calendar button and clicking on the needed date.



2. After you select the date you then need to select the patient. Start to type their name (first name followed by last name) into the Full Name box. As you type you will see suggested names appear in the box.



3. A second way to add find a name is to click on the down arrow and select the name from the drop down list.

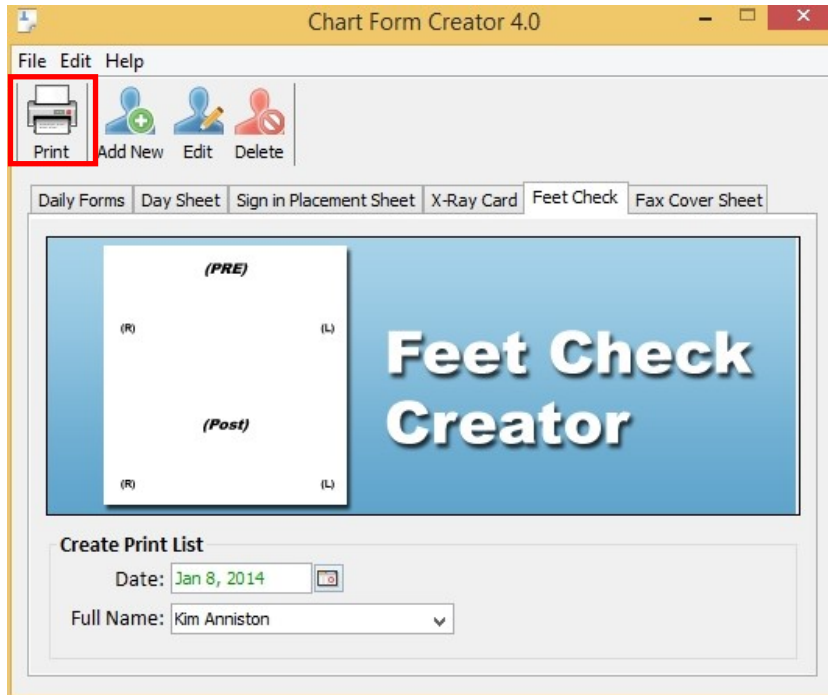
The screenshot shows the 'Chart Form Creator 4.0' application window. The title bar includes standard window controls. The menu bar has 'File', 'Edit', and 'Help'. Below the menu bar is a toolbar with icons for 'Print', 'Add New', 'Edit', and 'Delete'. A tabbed interface shows several tabs: 'Daily Forms', 'Day Sheet', 'Sign in Placement Sheet', 'X-Ray Card', 'Feet Check' (which is the active tab), and 'Fax Cover Sheet'. The main content area displays a preview of a 'Feet Check' form. The form has a blue header with the title 'Feet Check Creator' in large white letters. Below the header is a white rectangular area divided into four quadrants by a vertical line. The top-left quadrant is labeled '(PRE)' and the bottom-left quadrant is labeled '(Post)'. The right side of the form is a solid blue area. Below the form preview, there is a section titled 'Create Print List'. It contains a 'Date:' label followed by a text input field and a calendar icon. Below that is a 'Full Name:' label followed by a text input field containing 'Kim Anniston' and a red square button with a white downward arrow, indicating a dropdown menu.

- NOTE -

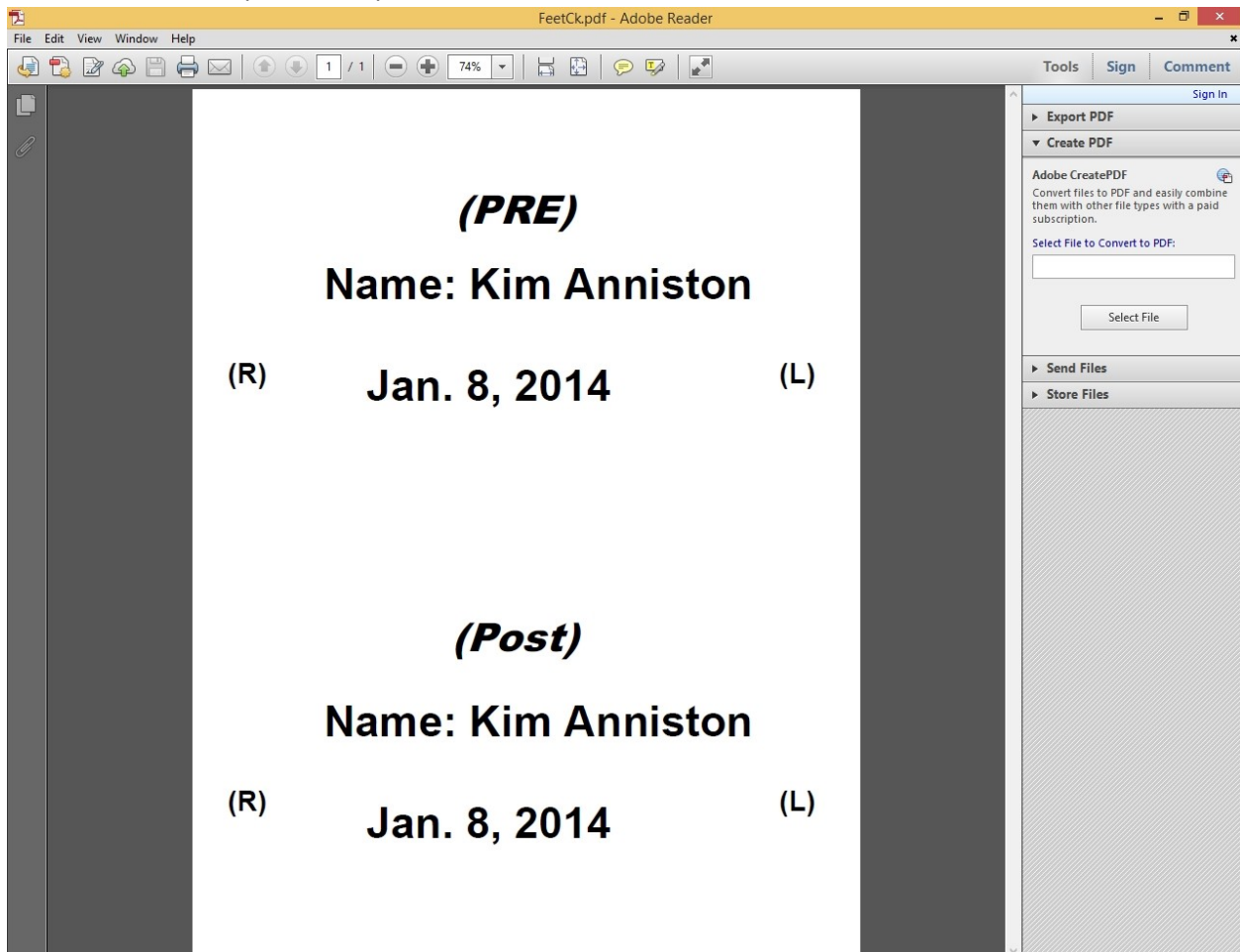
If you cannot find the name you are looking for you may need to add it to the repository of patient names. See page 8 to find out how to do this.

Printing a Feet Check Form

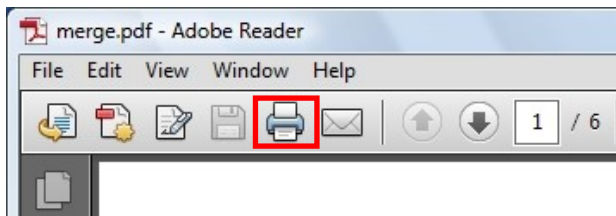
1. When you are ready to print the feet check form, click the print button.



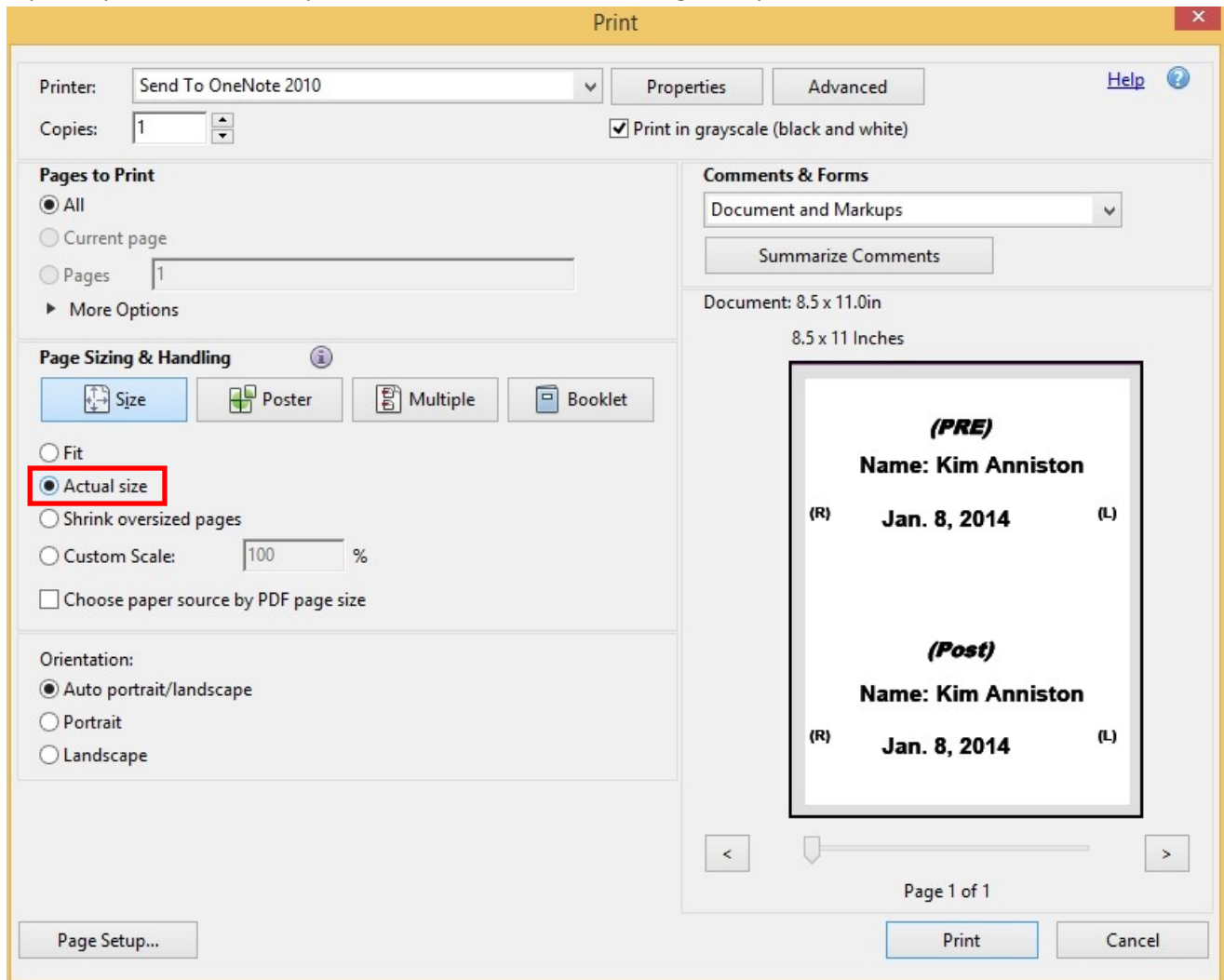
2. Adobe Reader will open with a preview of the forms that have been created.



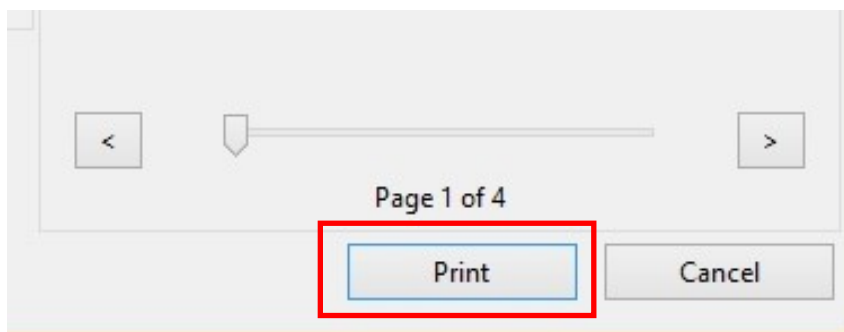
3. If the forms are correct click the print button in Adobe Reader.



4. A print option screen will open. Make sure under the heading size options, that actual size is selected.



5. Click the Print button to complete the printing process.



- NOTE -

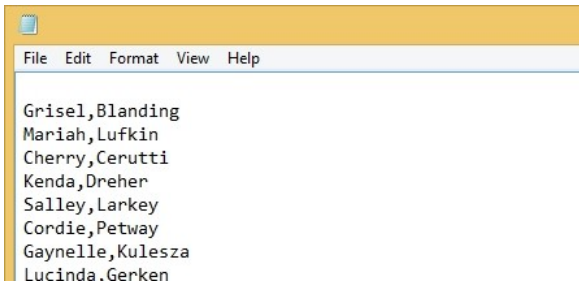
After printing make sure to close out of Adobe Read.

Fax Cover Sheet Tab

This tab is currently in development. Using this tab may result in errors on the fax cover sheet. This tab will be full released in version 4.1.

Importing a Patient List [Advance]

The first time you run the program, after installation, there will be no patients in the Repository. If you have a large number of names to add you can use the importer to import a comma delimited list. Below is the format that the data needs to be in. (firstName,Lastname)



Grisel,Blanding
Mariah,Lufkin
Cherry,Cerutti
Kenda,Dreher
Salley,Larkey
Cordie,Petway
Gaynelle,Kulesza
Lucinda.Gerken

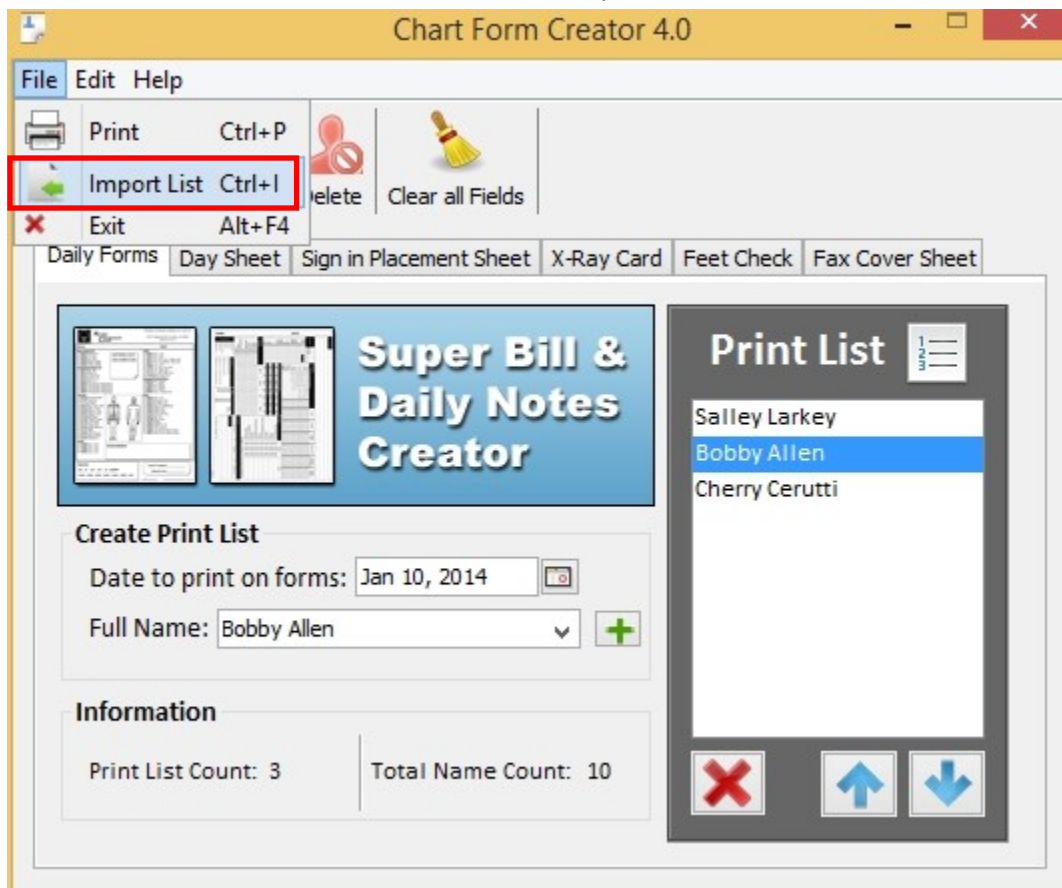
- NOTE -

The capitalization of the names does not matter. When the names are imported they will be change to the correct capitalization.

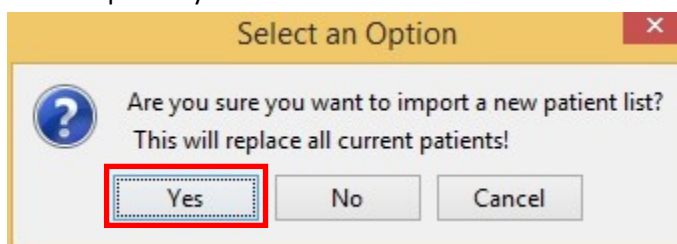
- IMPORTANT -

The first line of the date file must be blank.

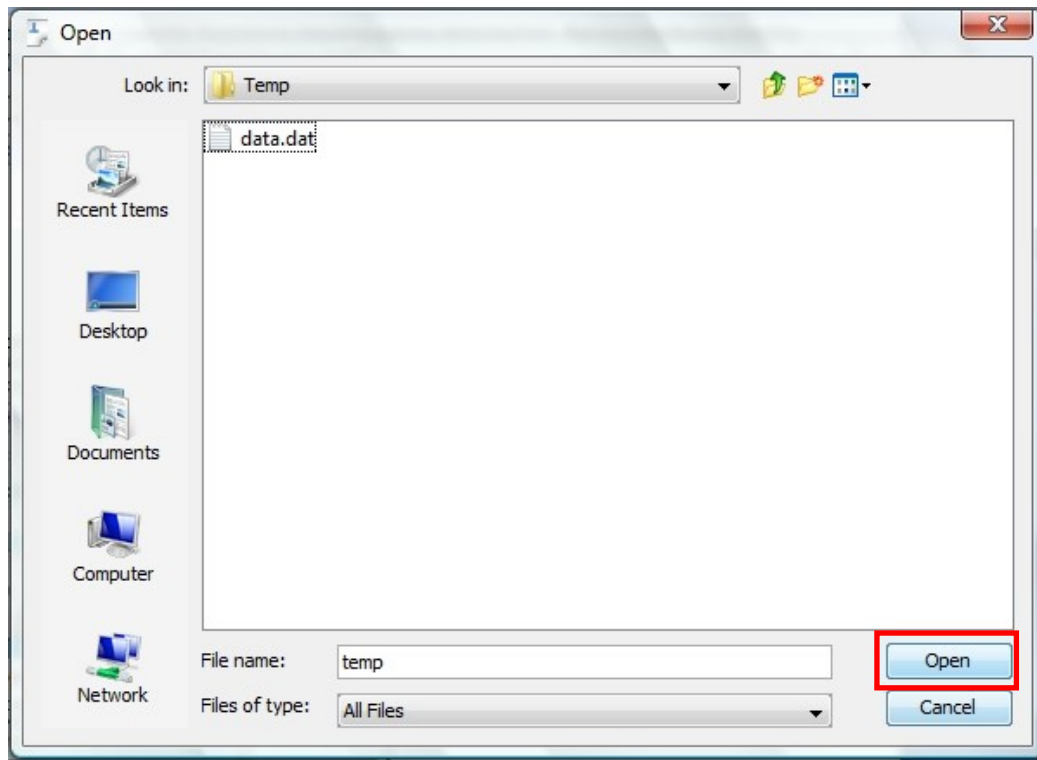
1. Click on File on the menu bar and then click on Import List.



2. A confirmation box will appear warning you that importing a new patient list will replace all the current names in the repository. Click Yes.



3. In the window that opens find and select your data file and click open.



4. The importing process has started. This process may take between 1 – 10 minutes depending on the size of the data file that you are importing. You will see a confirmation when the process has been completed.

